

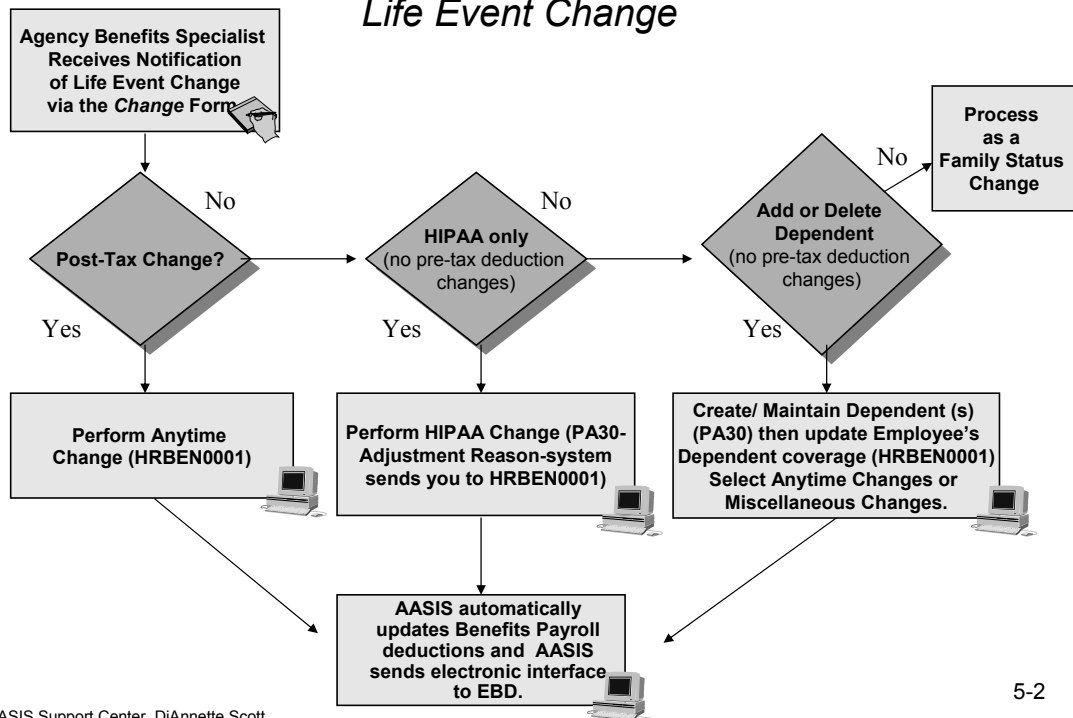


HRBEN BENEFITS ADMINISTRATION

Chapter 5 – Maintain Employee Benefits Data



Master Employee Benefits Data *Life Event Change*



AASIS Support Center, DiAnnette Scott
July'04, Revised to 7V5.0

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The Agency Benefits Specialist reviews the Employee's Change form, compares the new selections against existing benefits to verify changes and requests event documentation such as a Birth Certificate, Marriage license, Divorce decree, ect.

If Pre-Tax Deductions are affected due to a Family Status Change, the Agency Benefits Specialist must sign the Employee's Change form, makes a copy for their records and forward the original form and documentation to FBMC approval. The Agency Benefits Specialist will process the employee's changes and send a copy of the form with documentation to imaging per EBD's Policies and Procedures.

The effective date for a life event change in AASIS must not be a date in a closed fiscal year. If it is necessary for the agency to have Master Data corrected in a closed fiscal year, the agency must send a request with justification to the Office of Personnel Management/State Payroll (fax number 501-682-5094) for approval.



Exercise **Scenario #5**

- Display an employee's Benefits Data. To do this, view the Employee's Medical Plan information and note any dependent coverage they may have. Take this opportunity to explore several Infotypes.
- *Display this exercise with Transaction code **PA20**.





Demonstration

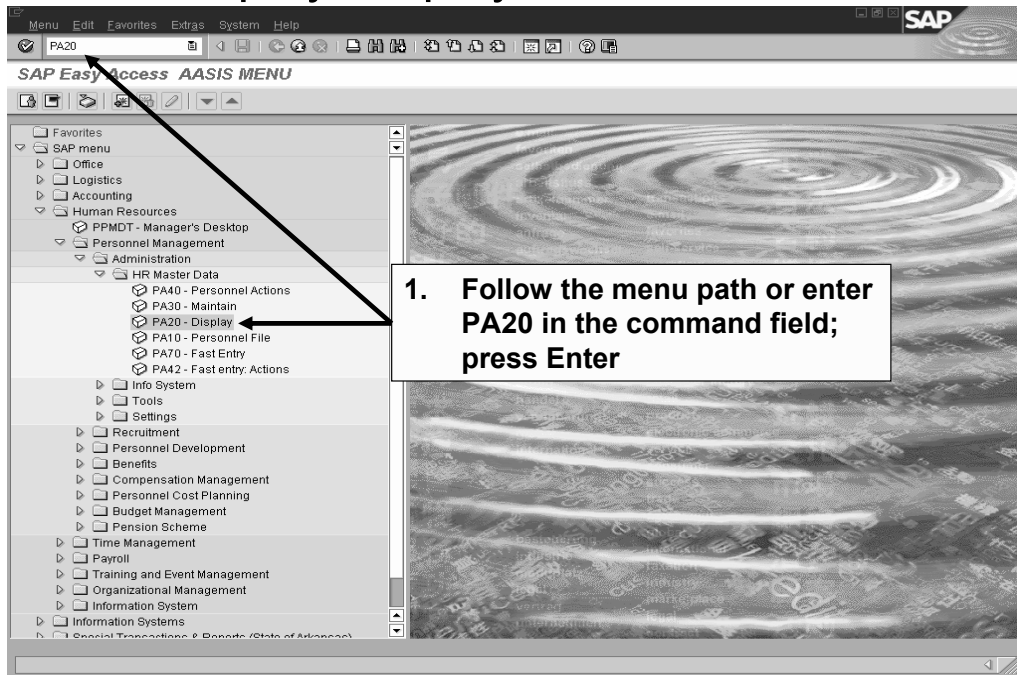
- Display Employee Benefit Data

Human Resources > Personnel Management >
Administration > HR Master Data > Display
(PA20)





Display Employee Benefit Data



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Display Employee Benefit Data

The screenshot shows the SAP HR Master Data display interface. The title bar reads 'HR master data Edit Goto Extras Utilities Settings System Help' and the SAP logo is in the top right. The main window title is 'Display HR Master Data'. Below this, there are input fields for 'Personnel no.' (containing '55'), 'Name' (containing 'Gail Hadley'), 'EE group' (containing '1 Regular State'), and 'EE subgroup' (containing 'UE Employee'). A callout box with the text '2. Enter the Employee's personnel number' points to the 'Personnel no.' field. Below the input fields are tabs for 'Personal Data', 'Addtl. Employee Data', 'Employment Issues', and 'Career Manage...'. The 'Personal Data' tab is selected. On the right side of the 'Personal Data' tab, there are left and right scroll buttons. A callout box with the text '3. Use the left and right scroll buttons to select the Benefits tab' points to these buttons. The main content area of the 'Personal Data' tab is divided into two sections: 'Infotype text' on the left and 'Period' on the right. The 'Infotype text' section has a list of infotypes with checkboxes: 'Actions', 'Personal Data', 'Organizational Assignment', 'Addresses', 'Basic Pay', 'Family Member/Dependents', 'Residence Status', 'Additional Personal Data', and 'Communication'. The 'Period' section has a 'Period' dropdown set to 'Period', with 'Fr.' and 'To' date fields. Below these are radio button options: 'Today', 'A11', 'From curr. date', 'To current date', 'Curr. period', 'Curr. week', 'Current mo', 'Last week', 'Last month', and 'Current Year'. A 'Choose' button is at the bottom of the 'Period' section. At the bottom of the 'Personal Data' tab, there is a 'Direct selection' section with 'Infotype' and 'STy' fields.

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Note: If you do not know the employee's personnel number, use the match code search functionality to search by name.



Display Employee Benefit Data

The screenshot shows the SAP HR Master Data display interface. At the top, the title bar reads "Display HR Master Data". Below this, the "Person" tab is active, showing fields for Name, EE group (1), Regular State, Pers. area (FA04), DFA, EE subgroup (UE), Employee, Cost Center (383238), and ZOO. A callout box labeled "5. Click to Display" points to the "Display" icon in the top left of the main content area. Below the person information, there are tabs for "Employment Issues", "Career Management", "Benefits", "Payroll", and "Taxes". The "Benefits" tab is selected. On the left side of the Benefits tab, there is a list of infotype categories: "Infotype text", "General Benefits Information", "Family Member/Dependents", "Adjustment Reasons", "Health Plans", "Insurance Plans", "Savings Plans", and "Flexible Spending Accounts". A callout box labeled "4. Click the Family Member/Dependents tab or enter 0021 for the Infotype field" points to the "Family Member/Dependents" option. On the right side of the Benefits tab, there is a "Period" section with radio buttons for "Today", "All", "From curr. date", "To current date", "Curr. week", "Current month", "Last week", "Last month", "Curr. period", and "Current Year".



Display Employee Benefit Data

Infotype Edit Goto Extras System Help

Display Family/Related

7. Click to view the Employee's information on other dependents

Personnel no: 310

EE group: 1 Regular State Em... Personnel ar: no22 Conway-Conway HDC

EE subgroup: U0 Hourly SSN: 444-33-3029

From: 03/01/2000 To: 12/31/9999 Chng: 04/19/2001 ARH16BEE

Family type: Spouse

Personal data

Last name: GORDON Birth name:

First name: SALLY

Gender: ☒ Female ☐ Male

Birth date: 10/25/1965 Ref.per.no:

SSN: Tel.no: 0

Street: 5801 North 17th Street Sep. date:

City/state: Little Rock AR Arkansas

Zip/country: 72201 US USA

Physician

Physician1:

ID number:

Physician2:

Status

☐ Student ☐ Disability

☐ COBRA ☐ Disab.date:

☐ Medicare Learned:

6. View Dependent information

517 sapqas INS



Display Employee Benefit Data

Infotype Edit Goto Extras System Help

Display Family/Related Person

9. Click 'Back'

Personnel no.	310	Name	Mr. GREG	Status	Active
EE group	1 Regular State Em...	Personnel ar	HS22	Conway-Conway HDC	
EE subgroup	U0 Hourly	SSN	444-33-3029		
From	03/01/2000	To	12/31/9999	Chng	04/19/2001 ARH16BEE

Family type: Child

Personal data

Last name	GORDON
First name	DUSTY
Gender	<input type="radio"/> Female <input checked="" type="radio"/> Male
Birth date	01/01/2000
SSN	
Street	
Street	
City/state	
Zip/country	

Ref.per.no	
Tel.no.	0
Sep. date	

Physician

Physician1	
ID number	
Physician2	

Status

<input type="checkbox"/> Student
<input type="checkbox"/> COBRA
<input type="checkbox"/> Medicare

Challenge

<input type="checkbox"/> Disability	
Disab.date	
Learned	

8. View Dependent information

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Display Employee Benefit Data

HR master data Edit Goto Extras Utilities Settings System Help

Display HR Master Data

Personnel no.

Name

EE group 1 Regular State ... Pers.area H522 Conway-Conway HDC

EE subgroup U0 Hourly Cost center 419161 TCT

Employment Issues Career Management Benefits Payroll Taxes

General Benefits Information ☒ Period

Family/Related Person ☒

Adjustment Reasons ☒

Health Plans ☒

Insurance Plans ☒

Savings Plans ☒

Flexible Spending Accounts ☒

Benefits Medical Information ☒

Period

Fr. To

☐ Today ☐ Curr.week

☐ All ☐ Current month

☐ From curr.date ☐ Last week

☐ To current date ☐ Last month

☐ Current year

Choose

Infotype Adjustment Reasons STy

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11. Click to Display`

10. Click on Health Plans or enter 0167 in the Infotype field



Display Employee Benefit Data

Infotype Edit Goto Extras System Help

Display Health Plans

Personnel No: 55 Name: Ga11 Ha... Status: Active

EE group: 1 Regular State Em... Personnel ar: FA04 DFA

EE subgroup: UE Employee SSN: 112-66-0815

Start: 11/21/2004 to: 12/31/9999 Chng: 11/12/2004 DLSCOTT

Plan: HM02 Health Advantage HMO

Plan data Administration Costs Dependents Additional data

General plan data

Benefit area	US State of Arkansas-US
Plan type	MED1 Medical
Benefit plan	HM02 Health Advantage HMO
Health Plan Option	OPT1 Standard HMO ASE 1
Dependent Coverage	EC1 Emp + Child(ren) 1

Planning Parameters

Cost Rule Variant	EC1 Employee & Child(ren)1
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Additional fields

Original End Date		Prev Recalc	
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12. Click on the Dependent tab.

Note: Notice that the Employee has Employee + Child(ren) Dependent coverage for Health Advantage HMO.

PA30 sapetr INS



Display Employee Benefit Data

The screenshot shows the SAP 'Display Health Plans' interface. At the top, there is a menu bar with 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The main area is titled 'Display Health Plans' and contains a form for displaying employee benefit data. The form includes fields for 'Personnel No.' (55), 'EE group' (1), 'Regular State Em...' (Personnel), 'Plan' (H102 Health Advantage HMO), and 'Start' (11/21/2004) to '12/31/9999'. A callout box labeled '14. Click 'Back'' points to the 'Back' button in the toolbar. Below the main form, there is a tabbed interface with 'Plan data', 'Administration', 'Costs', 'Dependents', and 'Additional data'. The 'Dependents' tab is active, showing a table with columns 'Select.', 'Name', 'Type of depende...', 'ID number', and 'Birth date'. The table contains one row for 'Ginger Hadley' with a checked 'Select.' checkbox. A callout box labeled '13. Verify that the Dependents have been selected for coverage' points to the 'Select.' checkbox. At the bottom of the screen, there is a status bar with 'PA30', 'sapetr', and 'INS'.

14. Click 'Back'

13. Verify that the Dependents have been selected for coverage



Display Employee Benefit Data

HR master data Edit Goto Extras Utilities Settings System Help

Display HR Master Data

Personnel Name

EE group 1 Regular State ... Pers.area H522 Conway-Conway HDC

EE subgroup U0 Hourly Cost center 419161 TCT

Employment Issues Career Management Benefits Payroll Taxes

General Benefits Information ☒ Family/Related Person ☒ Adjustment Reasons ☒ Health Plans ☒ Insurance Plans ☒ Savings Plans ☒ Flexible Spending Accounts ☐ Benefits Medical Information ☐

Period

Period

Fr. To

☐ Today ☐ Curr.week

☐ All ☐ Current month

☐ From curr.date ☐ Last week

☐ To current date ☐ Last month

☐ Curr.period ☐ Current year

Choose

Infotype Health Plans STy

517 sapqas INS

16. Click to Display

15. Click the Insurance Plans infotype 0168



Display Employee Benefit Data

The screenshot shows the SAP 'Display Insurance Plans' interface. At the top is a menu bar with 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The main title 'Display Insurance Plans' is centered. Below the title is a header section with fields for Personnel no. (310), Name (Mr. GRE6...), Status (Active), EE group (1 Regular State Em...), Personnel ar (HS22 Conway-Conway HDC), EE subgroup (U0 Hourly), SSN (444-33-3029), From (04/01/2000), to (12/31/9999), Chng (04/23/2001), and ARHI6BEE. Below this is a 'Plan' field with value 'BE01 US Able (Basic EE Life ASE)'. A tabbed interface shows 'Plan data' selected, with sub-tabs for 'Administration', 'Ins.cover.', 'Costs', and 'Beneficiaries'. The 'General plan data' section contains fields for Benefit area (US State of Arkansas-US), Plan type (BLIF Basic Life), Benefit plan (BE01 US Able (Basic EE Life ASE)), and Insurance option (BL01 Basic EE Life \$10K Coverage). The 'Planning Parameters' section contains fields for Coverage variant (CV01 \$10,000 Coverage) and Cost rule variant (CST1 Basic EE Life (ASE)). A status bar at the bottom shows '517', 'sapqas', and 'INS'. Two callout boxes are present: one pointing to the 'Back' icon in the toolbar with the text '18. Click 'Back'', and another pointing to the 'General plan data' section with the text '17. View the Insurance plan data'.

18. Click 'Back'

17. View the Insurance plan data



Display Employee Benefit Data

HR master data Edit Goto Extras Utilities Settings System Help

Display HR Master Data

Personnel no.

Name

EE group 1 Regular State ... Pers.area H522 Conway-Conway HDC

EE subgroup U0 Hourly Cost center 419161 TCT

Employment Issues Career Management Benefits Payroll Taxes

☐ General Benefits Information ☒ Period

☐ Family/Related Person ☒ Period

☐ Adjustment Reasons ☒ Period

☐ Health Plans ☒ Period

☐ Insurance Plans ☒ Period

☐ Savings Plans ☒ Period

☐ Flexible Spending Accounts ☒ Period

☐ Benefits Medical Information ☒ Period

Period

Fr. To

☐ Today ☐ Curr.week

☐ All ☐ Current month

☐ From curr.date ☐ Last week

☐ To current date ☐ Last month

☐ Current year

Infotype Insurance Plans STy

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20. Click
to Display

19. Click on the Savings Plans or
enter 0169 in the Infotype field



Display Employee Benefit Data

The screenshot shows the SAP 'Display Savings Plans' interface. At the top is a menu bar with 'Infotype', 'Edit', 'Goto', 'Extras', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main area is titled 'Display Savings Plans' and contains a form for employee data. The form has tabs for 'Plan data', 'Administration', 'Regular contrib.', 'Bonus contribution', and 'Benefic...'. The 'Plan data' tab is selected, showing 'General plan data' and 'Planning Parameters' sections. The 'General plan data' section includes fields for 'Benefit area' (US), 'Plan type' (401A), and 'Benefit plan' (R101). The 'Planning Parameters' section includes fields for 'EE contr. variant' (401A), 'ER contr. variant' (401A), 'Vesting rule' (VR1), and 'Investment group'. Annotations with arrows point to specific elements: '22. Click 'Next' to view other Savings plans; if applicable' points to the 'Next' button in the toolbar; '23. Click to Exit' points to the 'Exit' button in the toolbar; and '21. View the Employee's Savings Plan data' points to the 'Benefit plan' field in the 'General plan data' section.

Infotype Edit Goto Extras System Help

Display Savings Plans

Personnel no: 310 Name: Mr. GRE6... Status: Active

22. Click 'Next' to view other Savings plans; if applicable

23. Click to Exit

21. View the Employee's Savings Plan data

Plan data Administration Regular contrib. Bonus contribution Benefic...

General plan data

Benefit area: US State of Arkansas-US

Plan type: 401A 401(a)

Benefit plan: R101 APERS Non-Contrib EE 0%/ER 10%

Planning Parameters

EE contr. variant: 401A 401a EE

ER contr. variant: 401A 401a ER Match

Vesting rule: VR1 Vesting 100% at 5 yr

Investment group:

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Exercise Scenario #6

- Display their Benefits Data. To do this view the Employee's Medical Plan information and note their Dependent coverage.

*Repeat previous exercise with Transaction code **HRBEN0006**.





Demonstration

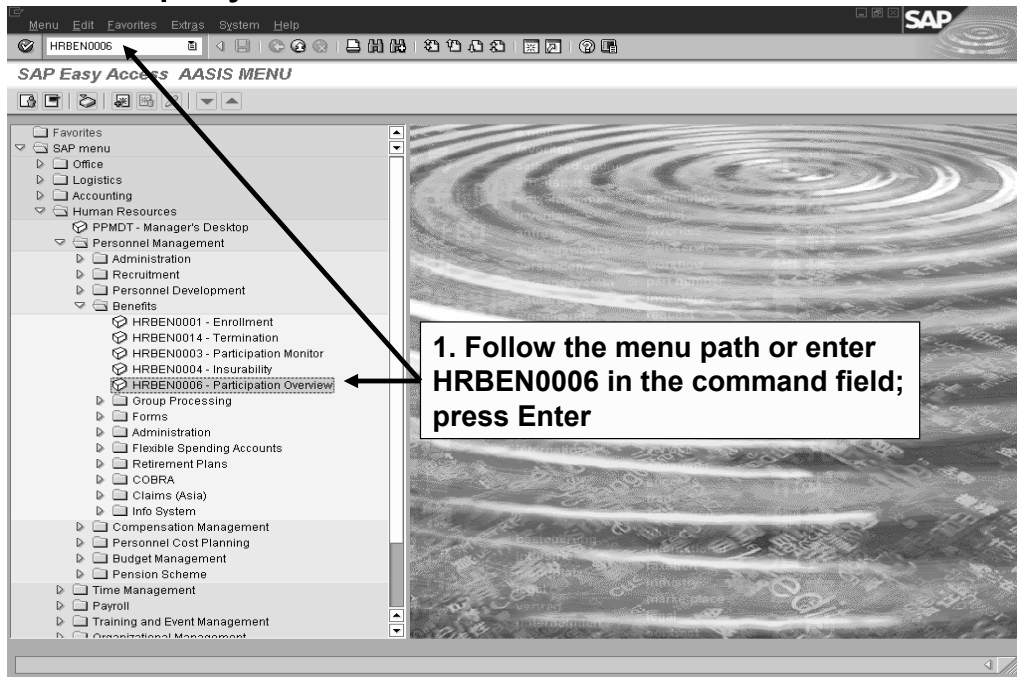
- Display Overview of Benefit Plan Data

Human Resources > Personnel Management >
Benefits > Overview
(HRBEN0006)





Display Overview of Benefit Plan Data



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Display Overview of Benefit Plan Data

3. Hit to continue or hit Enter

2. Enter the Employee's personnel number

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Note: If you do not know the employee's personnel number, use the match code search functionality to search by name.



Display Overview of Benefit Plan Data

Overview Edit Goto System Help

General Overview of Benefit Plan Data

Direct selection Selection set

Personnel no. 55

ID number

Select

Pers.No. Name

55 Gail Hadley

Display

Name Gail Hadley on 07/02/2004

Plans Costs Master Data Overview

Display Change Confirmation form Error list

▶ Health Advantage HMO	02/01/2004 - 12/31/9999
▶ US Able (Basic EE Life ASE)	02/01/2004 - 12/31/9999
▶ US Able-Opt EE Life ASE 1x2x	02/01/2004 - 12/31/9999
APERS Non-Contrib EE 0%/ER 10%	06/30/2004 - 12/31/9999

4. Click on Plan of choice to expand



Display Overview of Benefit Plan Data

Overview Edit Goto System Help

General Overview of Benefit Plan Data

Direct selection Selection set

Personnel no. 55

ID number

Select

Pers.No. Name

55 Gail Hadley

Display

Name Gail Hadley on 07/02/2004

Plans Costs Master Data Overview

Display Change Confirmation form Error list

Health Advantage HMO	02/01/2004 - 12/31/9999
Option	Standard HMO ASE
Dependent coverage	Employee
EE pre-tax	USD 61.22 Monthly
Payment model	Two times a month
US Able (Basic EE Life ASE)	02/01/2004 - 12/31/9999
US Able-Opt EE Life ASE 1X/2X	02/01/2004 - 12/31/9999
APERS Non-Contrib EE 0%/ER 10%	06/30/2004 - 12/31/9999

5. View results

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Display Overview of Benefit Plan Data

Overview Edit Goto System Help

General Overview of Benefit Plan Data

Direct selection Selection set

Personnel no. 55

ID number

Select

Pers No Name

55 Gail Hadley

Display

Name Gail Hadley on 07/02/2004

Plans Costs Master Data Overview

Display Change Confirmation form Error list

Health Advantage HMO	02/01/2004 - 12/31/9999
Option	Standard HMO ASE
Dependent coverage	Employee
EE pre-tax	USD 61.22 Monthly
Payment model	Two times a month
US Able (Basic EE Life ASE)	02/01/2004 - 12/31/9999
Option	Basic EE Life Coverage
Coverage amount	USD 10,000.00
Payment model	Two times a month
US Able-Opt EE Life ASE 1X/2X	02/01/2004 - 12/31/9999
Option	Optional Life ASE 2X SAL
Coverage amount	USD 40,000.00
EE pre-tax	USD 9.60 Monthly
Payment model	Two times a month
APERS Non-Contrib EE 0%/ER 10%	06/30/2004 - 12/31/9999

ETR (1) (516) sapetr INS

6. Double click
selected entry for
further details



Display Overview of Benefit Plan Data

The screenshot shows the SAP 'Display Health Plans' interface. A callout box with an arrow pointing to the 'Back' button in the toolbar contains the text: '7. Hit 'Back' to get back to the Benefit Plan display screen'. Another callout box on the right side of the screen contains the text: 'Note: 'Further Details' takes you to the PA20 Display screen for viewing'. The main screen displays plan data for 'HM02 Health Advantage HMO'.

Display Health Plans

Personnel
EE group
EE subgroup: UE Employee SSN: 112-66-0815
Start: 06/30/2004 to: 12/31/9999 Chng: 06/30/2004 TRAIN-HR015
Plan: HM02 Health Advantage HMO

Plan data Administration Costs Dependents Additional data

General plan data
Benefit area: US State of Arkansas-US
Plan type: MED I Medical
Benefit plan: HM02 Health Advantage HMO
Health Plan Option: OPT1 Standard HMO ASE
Dependent Coverage: EE*0 Employee

Planning Parameters
Cost Rule Variant: EE*0 Employee Only

Additional fields
Original End Date: Prev Recalc: ☐

ETR (1) (516) sapetr INS



Display Overview of Benefit Plan Data

Overview Edit Goto System Help

General Overview of Benefit Plan Data

8. Click Exit once you are done viewing

Direct selection Selection set

Personnel no. 55

ID number

Select

Pers.No. Name

55 Gail Hadley

Display

Name Gail Hadley on 07/02/2004

Plans Costs Master Data Overview

Display Change Confirmation form Error list

Health Advantage HMO	02/01/2004 - 12/31/9999
Option	Standard HMO ASE
Dependent coverage	Employee
EE pre-tax	USD 61.22 Monthly
Payment model	Two times a month
US Able (Basic EE Life ASE)	02/01/2004 - 12/31/9999
Option	Basic EE Life Coverage
Coverage amount	USD 10,000.00
Payment model	Two times a month
US Able-Opt EE Life ASE 1X/2X	02/01/2004 - 12/31/9999
Option	Optional Life ASE 2X SAL
Coverage amount	USD 40,000.00
EE pre-tax	USD 9.60 Monthly
Payment model	Two times a month
APERS Non-Contrib EE 0%/ER 10%	06/30/2004 - 12/31/9999

Note: Any Plan may be viewed by double-clicking to expand.

ETR (1) (516) sapetr INS

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Questions and Answers

